

# Change agents

## How Adaptavist is helping Collective Health deliver an unparalleled member experience.

### COLLECTIVE HEALTH NEEDED:

- ✓ An integrated solution to support consistently high, industry-leading customer satisfaction levels
- ✓ A solution that can scale to handle its rapidly growing customer base, as well as minimise manual interactions and optimise efficiency
- ✓ Processes and data management that meet regulatory requirements and customer expectations around privacy
- ✓ Abundant metrics so Collective Health can track and fine tune performance

### ADAPTAVIST SUPPLIED:

- ✓ 'One-stop-shop' Atlassian expertise across analysis, implementation, project management and custom software development
- ✓ Compliant systems that go beyond regulatory requirements and provide all required metrics
- ✓ Insight and understanding of Collective Health's business objectives and needs
- ✓ A reliable, trusted, technology partnership

## BACKGROUND

### The client

Collective Health (CH) is a software and services company on a mission to transform the health benefits experience in America. By combining new technology, modern design and a high-touch Member Advocate team, Collective Health is working to improve how organisations administer self-funded health plans and support people with their healthcare. But in order to do that, they need tools and technology designed specifically for their needs.

In 2015 the company was in learning mode with a pilot group of 100 customers, but knew that come January 1st 2016, that would grow to 30,000. "We needed a technology solution that could scale with us, and we needed to do it quickly," notes Preston Tollinger, CH's Chief Technology Officer.

### System and supplier

Preston knew that JIRA was the tool that would get the job done. "We didn't know exactly where we were going," he says, "so JIRA was a good choice because it's highly configurable and customisable." However, given the tight timeframe and degree of customisation required, CH would need external help with its systems' transformation. The company had to find an Atlassian consultancy that would meet its exacting needs.

Preston surveyed the available Atlassian Platinum experts and scanned online write-ups. Knowing of Adaptavist and using our add-ons, he got in touch for some exploratory conversations and soon invited our team to visit CH in person. "Given the kind of work you guys like to do, you seemed much more in line with our needs than other companies," notes Preston. "When you started doing the digging, you really understood that this was not a cookie-cutter project, that we had a different set of requirements and required a lot of interesting work to get there." Moreover, he notes, "You were excited to do it."





## DELIVERING THE SOLUTION

### Discovery phase

CH wanted the most efficient system possible to support its customer service agents (known as Member Advocates) and empower these highly motivated people to provide unmatched customer service. To this end, CH wanted help ensuring that information would only be generated once; that there would be fast, accurate and complete information retrieval; and that there would be as little manual interaction and as much automated data entry as possible.

CH had a vision of what it needed but not a clear view of how to get there. So initially Adaptavist's team spent time in California gathering CH's requirements in person and shaping their understanding of what was required. Deeper conversations followed about the right direction to take, and to explore in detail how both Confluence and JIRA could be used in the context of their respective strengths and weaknesses. "As we started pushing it," says Preston, "we found the right balance between what we were trying to accomplish and how best to use the tools."

**"The willingness to put aside assumptions... and revisit with our specific needs in mind was very positive."**

*Preston Tollinger, CTO*

### Building the solution

The initial implementation was an exercise in implementing information architecture and knowledge management in Confluence. Adaptavist suggested how the information should be organised and how to ensure that data is re-used in its various contexts. Adaptavist also enhanced the search facility in Confluence with custom development to apply labels as a filter so searching is quicker and more powerful.

Next, Adaptavist suggested that JIRA – already in use for internal development work – would be a good fit for the Member Advocates. This led to a lot of business analysis and mapping out of specific workflows to accommodate CH's processes and customer interactions as well as internal and state-mandated SLAs. JIRA Service Desk was brought in to manage service levels and queue handling. And as the requirements became more complicated, ScriptRunner was introduced to manage the interface between systems. For instance, ScriptRunner was used to automate a transition when a comment is entered for Member Advocates. Using a

either native commenting in JIRA Service Desk or a JIRA Add-On negatively impacted the ability to meet the first response SLA. Adaptavist also built an add-on to enhance JIRA auditing, meaning CH can see who has viewed any given issue.

JIRA Enterprise Message Handler (JEMH) was brought in to handle both incoming and outgoing emails. For incoming email, JEMH needs to pick up a variety of different information, map it to different issue types and custom fields, and potentially transition a workflow. For outgoing email, JEMH acknowledges an initial customer contact; turns outgoing Member Advocate comments into emails; and issues a survey when tickets are closed. The goal is that the customer experiences fantastic, accurate, timely service.

### Meeting regulatory and customer requirements

CH needs to meet US regulatory requirements in terms of Protected Health Information (PHI). It also wants its members to be completely confident that their personal health information is being sensitively handled. In this regard, Irene Tollinger, CH's Director of Program Management cites a unique piece of functionality that Adaptavist wrote in ScriptRunner to manage permission inheritance. "It's an example I would give that captures the value of the work that you guys are laying on top of Atlassian functionality," she says.

Permission inheritance ensures that access to protected health information is limited to the period when a ticket is open. Adds Irene, "We were trying to do it not just in a basic way which you can do with adding watchers, or having manually set permissions. We wanted to make it really efficient both for the operational teams and the engineers. What you implemented is the ability to automatically give permission until the engineering ticket closes and then revoke the access, so it's dynamic which saves time and we're cleaning data as we go so it's both efficient and secure."

Finally, in the health benefits administration sector it's not unusual that a query takes many weeks or months to be resolved and in the process accumulates 50 or 60 comments. One of CH's big requirements was that its systems would never lose a query, that they would always follow up, and that CH would never drop the ball. This called for logging, error reporting and an ancillary infrastructure which includes queues, alerts for escalations, special research, question referrals to partners, internal bug reporting and appeals. It all means that CH can confidently say that no communication ever drops through the cracks.

Proof of the effectiveness of CH's system come through every day in positive feedback from members. A recent member survey prompted the following appreciation: "Every time I speak with a CH rep, I'm always so impressed by the attention to detail and nuance provided in answers to my questions. CH has totally disrupted the healthcare experience for consumers and has transformed what has always been a painful process into a seamless, pleasant experience."



## HOW ADAPTAVIST MAKES A DIFFERENCE

### Results

The new systems went live to 30,000 customers on January 1st 2016. They are now experiencing fast turnaround times due to the visibility provided by JIRA Service Desk and the dashboards, queues, and SLAs that Adaptavist has built.

Call volumes have risen dramatically since January 1, 2016, but Member Advocates are quickly alerted to the work they need to do, and nothing gets lost.

Meanwhile, Member Advocates have clear visibility and confidence in what they need to do. Their workload is managed so team members can stay focused without being overwhelmed by call volume. The data coming into JIRA is clean because the system is careful not to overburden the metrics-gathering, while still ensuring that all of the data CH needs to analyse and refine its operations is being collected.

### A comprehensive partnership

Adaptavist made a difference both in what it can provide and the way it's provided. For one thing, no other consultancy can supply such a comprehensive service, spanning so many different technologies and skill sets, while always remaining focused on business needs and outcomes.

The work encompassed business analysis, project management, JIRA and Confluence custom development, Confluence information architecture, Confluence templating and blueprinting, JIRA project and workflow development and ScriptRunner development. Adaptavist also brings the strength of its connections with Comala, JEMH, eazyBI, and, not least, Atlassian.

CH also appreciated Adaptavist's flexible approach to delivery. CH notes that we came into the engagement with very open minds. "Especially as you started drilling down into the complexities of our space," notes Preston, "the willingness to put aside assumptions about how best to use JIRA and Confluence and revisit that with our specific needs in mind was very positive."

CH particularly commends Adaptavist for understanding its needs in a business context. "We were very much looking for that holistic picture back from your team," says Irene, "and the value of working with you guys is you helped configure a tool that makes it very easy for our people. The tools support them in being as efficient as possible."

**"You guys have such expertise in Atlassian products, and can build with such clarity, that it's much more efficient to work with your experts than for us to try and build that expertise in depth ourselves. Your knowledge just makes our development process much more efficient."**

### More clarity and efficiency

Last but not least, Adaptavist helps CH work more efficiently. Preston comments, "The question is raised, 'Why don't we get a JIRA engineer in-house?' But you guys have such expertise in Atlassian products, and can build with such clarity, that it's much more efficient to work with your experts than for us to try and build that expertise in depth ourselves. Your knowledge just makes our development process much more efficient."


"As a team," concludes Preston, "we are working together very well and are excited to see where this can go."

See how we can help you, talk to our experts today >

#### ABOUT ADAPTAVIST

Adaptavist, established in 2005, is a London-headquartered IT services company providing premium professional services, support, hosting and licenced products to a wide range of national and international clients including over half of the Fortune 500 companies.

Adaptavist, an 'Atlassian Platinum and Enterprise Partner', is widely recognised as the most technically advanced Enterprise Partner in the Atlassian ecosystem.

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